



Bottled Water in Malaysia

November 2025

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Bottled Water in Malaysia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Hot climate and health awareness drive continued growth for bottled water

INDUSTRY PERFORMANCE

Malaysia's hot weather drives growth, although filtered water prevents a stronger rise

Flavoured bottled water competes successfully with sugary soft drinks

WHAT'S NEXT?

Continued growth as consumers turn to healthier soft drinks options

A move towards vending, and an increasing focus on sustainability

CAP calls on the government and consumers to take action, which could hamper growth

COMPETITIVE LANDSCAPE

Marketing, launches, and wide shelf presence maintain volume lead for Spritzer

Divergent performances for Coca-Cola brands Schweppes Soda Water and Dasani

CHANNELS

Large pack sizes which offer value for money favoured in hypermarkets

Travellers appreciate the product range offered by convenience retailers

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Soft Drinks in Malaysia - Industry Overview

EXECUTIVE SUMMARY

Navigating rising costs and the health trend in soft drinks

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INDUSTRY PERFORMANCE

Inflation and sugar tax limit the growth of soft drinks in 2025

On-trade growth as consumers indulge and tourist arrivals rise

Soft drinks sees innovation drive youth engagement amidst off-trade slowdown

WHAT'S NEXT?

Government aid and health trend expected to drive stable growth in soft drinks

Sugar tax pressures to reshape soft drinks, with focus on reformulation

Tourists will prioritise safety, driving demand for bottled water and coconut water

COMPETITIVE LANDSCAPE

F&N maintains its lead in soft drinks, leveraging diverse portfolio against rising costs

Local sourcing, broad distribution, and engaging campaigns propel dynamism for Kara Marketing

CHANNELS

Small local grocers maintains its lead amidst intensifying channel competition

Convenience stores, forecourt retailers, and supermarkets see distribution growth

On-trade surges with convenience and tourism, outpacing minimal off-trade growth

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